

## Leicestershire, Leicester and Rutland Record Office

### Guidelines on Sorting a Collection

Doctors are told to work on the principle of **'first do no harm'** – this means that whatever you do, don't make the problem worse! Archives should be looked at like this – there are a range of issues to consider before sorting, listing and making a collection available, from data protection to damp and mould. We always recommend you consult your local archive service or ask a professional archivist or conservator for advice. You can find contact details for your local service here

<http://discovery.nationalarchives.gov.uk/find-an-archive>

#### Introduction

Most organizations have created a large amount of paperwork and other types of information in the course of their usual business. It is quite common for much of this to be in filing cabinets or boxes and often stored in no particular way in less than ideal conditions. You might not think of them as archives or historically important, but if you picture someone looking at them in 100 years or think about old documents from 100 years ago you will start to see them in a new way. This is a good starting point.

#### First Steps

Try to ensure that you have all the records to work on or that you know where they all are. It is common for former staff or volunteers to have stored records at home or in a variety of locations. Try to find out where all the records of the organization are and then gather them all together. You might want to put out an appeal for further information before you start as it can be very frustrating to have new records suddenly arrive – though this is good news!

Before you move, destroy, alter or box anything think about the collection as a whole and whether the way it is now has a certain order which should be preserved. This does not need to be a long process, but make sure you don't jump in with both feet and make all sorts of changes you may later wish you hadn't.

If you have a collection of anything more than two or three boxes or there are several people working on it you might want to consider drawing up a work plan so everyone knows what to do and which areas have already been tackled.

#### Things you will need:

- Pencils
- Paper
- Boxes or other packaging – acid free is best but whatever you use make sure it is clean and dry

- Protective clothing (or wear something old) if the records are dusty, dirty or mouldy.

### **Making a start**

Work through the collection methodically in a logical order. This will ensure that you and others don't get confused about what has already been done and make it less likely that you will waste time trying to locate certain items or pieces of information that you may come across later.

The main aim is to decide what to keep and what to throw away. This is an important task as you will be deciding what people in the future know (or don't know) about the organization. Please consider seeking professional advice – archivists look at collections as a whole and the possible value of the information so they may give you a different perspective on the seemingly boring items you might think have no value.

### **How should I decide?**

This is a very hard question to answer! We can give some guidelines but there are no hard and fast rules. You should aim to keep records that will tell people what the organization did; its purpose and values, how it operated and how successful it was.

### **Some types of records you should keep**

- Minutes: signed minutes if possible
- Accounts: audited or signed accounts if possible
- Annual or other reports and strategy documents
- Policies: especially if drawn up by the organization or closely related to its work
- Subject files: what type of work did the organization do?
- Membership lists and case files: who did it serve or help?
- Publicity material: or samples of this if there is a huge quantity. Include things like leaflets and posters produced by the organization.
- Photographs: especially where subject and date is known and identified

### **Types of records you would not normally keep for archival reasons. They may be needed to comply with other legislation.**

- Individual staff files and pay slips
- Primary accounting material: such as receipts, invoices, till rolls, bills etc. Although these may be of interest if especially old or where accounts do not exist
- Multiple copies of items: as rule of thumb do not keep more than 3 copies of any item
- Printed books and leaflets, especially if produced in quantity (but keep items produced by the organization)
- Personal records of staff and clients such as Christmas cards

**Non-paper records**

Increasingly organizations have records stored on computer disks, tapes of various kinds or other devices, some of which may now be obsolete. You may even encounter cine-films or sound recordings. Archivists prefer paper (as we know this will last), but if it is not practical to make a printed copy or the items relate to moving images or sound please consult your local archive service or professional archivist.

**NB – A Warning!**

The above guidelines refer to selection for archival and historical purposes only. Bear in mind that you may need to keep financial and other information for a statutory or advisory minimum period of time. The most common period is 7 years. Check with a regulatory body if you are unsure.

**Making a list**

It is important to write down, as you go along, which items you are keeping and where they are. This can be time-consuming but will pay off in the long run (promise!) as it will be easier to find information. You can also be sure of what existed at a given date and keep track of the records you have.

It is also useful for identifying any gaps. For example, you might find that you have minutes from 1965-75, a gap between 1976 and 1978 and find they resume again in 1979. Someone in the organization might know the reason for this. This knowledge may even enable you to locate the missing items or at least provide an explanation as to why the gap exists.

Think of it as a list of the organization's assets, in the same way as equipment would be regarded.

**Please Do:**

- Handle all items with care using clean hands
- Gently remove metal clips and staples and replace them with brass paperclips
- Keep mouldy or insect infested documents away from those that are unaffected
- Keep food, drink, pens and other items that might cause damage away from documents – even with care, accidents can happen.

**Please Don't:**

- Handle items roughly, pull stuck pages apart or pull off paperclips and staples
- Bring documents into contact with food, drinks, inks or other substances which may harm them.

